DELPHI Skills Assessment for AR Lead Accounting Technician

Check the response that best matches your experience. **Circle** (or highlight) the 5-10 skills that relate to areas where you need additional (or refresher) training in order to use the system more effectively in your job.

Skills		Proficiency						
	Does not apply to my job	I don't know how	I need help	I can do with written steps	I can do with some help	I can do without help	I can explain what I am doing	I can teach someone else
Basic Navigation								
Prepare Journal Entries								
Reconcile Accounts Receivable with GL								
Create Recurring AR Invoice								
Generate Delinquency Notice								
Merge Customers								
Credit Balances and Refunds								
Customer Receipts – Cash Applications Adjustment								
Customer Receipts – Unidentified Cash								
Customer Setup Options								
Approve Miscellaneous Invoices								
Collections								
Credit Balances and Refunds								
Project Invoices								
Maintain Customers								
Maintain Customer Files								
Customer Credit Memos								
AR Adjustments								
Approving – Undercharge invoices, overcharge adjustments, and payment application corrections								